

## Logging In

To log in, you must have created a NCID account and been added as a user by your NCIR Administrator (see the pharmacy section of the Immunization Branch's website for more information: <http://www.immunize.nc.gov/providers/NCIR.htm>)

- ◆ To access the NCIR, visit: <https://ncir.dhhs.state.nc.us>
- ◆ Do not share usernames and passwords.
- ◆ You will be directed to change passwords every 90 days.
- ◆ Please log in monthly in order to keep your account active.

## Timing Out

- ◆ The system is set to time out after one hour of inactivity. To log back in, you may need to close and re-open your browser.

## Forgotten Usernames/Passwords

- ◆ If you forget your username or password, use the Forgot your User ID or Forgot your Password links on the login screen.
- ◆ To have a forgotten username emailed, you must provide your user type ("Business User").
- ◆ For a forgotten password, or after two failed attempts to login, you are directed to answer three of your five challenge questions and create a new password.
- ◆ Your account will lock after three failed attempts to login.

## Locked/Inactivated Accounts

- ◆ If you lock yourself out and you know your password, you may either:
  - ⇒ Wait one hour and try again.
  - ⇒ Contact the ITS Service Desk at 1-800-722-3946 to have your account unlocked immediately.
- ◆ If you no longer know your password and challenge question answers, or you have not logged into the NCIR for 90 days or more, your account will become inactive and the ITS Service Desk **cannot** recover it. You must register for a new NCID account and username. (Be sure to register as a "Business User" using your business address.) Your NCIR Administrator must deactivate the old username and add the new one.

**To access the NCIR, visit**

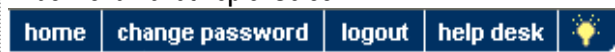
<https://ncir.dhhs.state.nc.us>

## Home Page

- ◆ On the home page, check for posted announcements and release notes (NCIR version updates).
- ◆ A yellow "NEW" symbol indicates that a post is unread.
- ◆ The home page contains links to information and resources, including VIS (Vaccine Information Statements) and VAERS (Vaccine Adverse Events Reporting System).

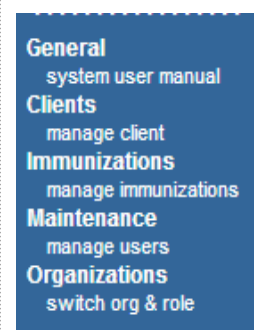


## Blue Menu Bar at Top of Screen



- ◆ Help desk: NCIR Help Desk phone and email address.
- ◆ Light bulb button: This opens an online help module that applies to whichever page you are viewing. It can be accessed from any screen in the NCIR.

## Blue Menu Panel on Left Side of Screen



- ◆ System User Manual: The user manual provides in-depth information/instructions. (**Note:** Not all sections of the User Manual apply to pharmacy users.)
- ◆ Manage Client: Use this option to search for a client.
- ◆ Manage Users: Only Pharmacy Administrators have this option. It is for activating/inactivating users and switching user roles.
- ◆ Switch Org & Role: Only users who work in multiple stores have this option. Click to switch to another store that you are active in.

## Searching for Clients

Many clients are already in the NCIR! Please be sure to exhaust all search options before adding a new client.

### Search for the client.

1. Click Manage Client.
2. When the "Client Search Criteria" box opens, enter the client's Last Name, First Name, and Birth Date.
3. Click the Find button.

### View search results to find the client.

There are three types of search results.

#### Exact Match

- ◆ If found, the client record opens automatically. Verify that this is the correct client.

#### Possible Matches

- ◆ If one or more possible clients are found, they are listed in a "Possible Matches" table below the search box (*example in brackets below*).

Last Name	First Name	Middle Name	Birth Date	Chart #	Mother's Maiden Last	Gender	City
TEST	CLIENT		01/01/2013		PHARMACY	U	Raleigh
TEST	CLIENT		01/01/1980			U	
TEST	CLIENT		01/01/1890			F	WINSTON

- ⇒ **Note:** If you locate a duplicate client record, contact the NCIR Help Desk at [NCIRHelp@dhhs.nc.gov](mailto:NCIRHelp@dhhs.nc.gov). Please note the NCIR Client ID number for both client records and, if possible, which record to keep and which one to delete.

- ◆ If any of the possible matches are particularly close, a "Client Match Detected" message is also displayed.

- ◆ Carefully review each possible match.
- ◆ When you find the client, click on the blue Last Name hyperlink to open the client record.

#### No Match

- ◆ If your search found no clients, or if none of the possible matches are your client, review your search criteria for accuracy.
- ⇒ **Tip:** For clients with a hyphenated or two part last name (e.g. Johnson-Smith), try searching for one part of the name (e.g. Smith).
- ⇒ **Tip:** Consider whether the client could have a record under a different (or misspelled) first or last name.

#### If not in NCIR, add the client

1. Click the **Add This Client** button at the top right (underneath the **Find** button).
- ⇒ **Note:** If your search generated a "Client Match Detected" message, click the **Create New Client** button instead.
2. The information that you entered on the search screen (First Name, Last Name, and Birth Date) is retained. Please enter all additional **Personal** and **Responsible Person** information and any **Client Comments** (see the following 'Edit Client Screen' section for details).
- ⇒ **Note:** If a patient already exists in the NCIR with exact or similar information to the patient that you are creating, you may see the screen shown below. **If you are sure this is not the same client, click the Create New Client button.**

## Client Records

Client records have three main parts:

1. **Edit Client screen:** For viewing, entering, and editing the client's personal/demographic information.
2. **History/Recommend screen:** For viewing the client's immunization information and determining which doses are needed. Through this screen vaccines are entered/edited.
3. **Reports screen:** For printing official client immunization records.

## Viewing the Edit Client Screen

- ◆ The Edit Client screen opens after you click **Manage Client** and find and open the client record.
- ◆ Update any information that has changed and enter any that is missing. Click **Save** after any edits.

### Personal Information section

- ◆ Please fill out this section (located on the top half of the screen) as completely and accurately as possible.
- ◆ This information is displayed on printed copies of the client's official immunization record.
- ◆ **Last Updated by** indicates the last organization that updated the record and the date of that update.

### Client Information tab

- ◆ This section is displayed when the screen opens. It is 1 of 3 tabbed sections located on the lower half of the screen.
- ◆ Please update **Ethnicity** and **Race** here.

### Responsible Person(s) tab

- ◆ Please enter at least one responsible person, even for adult clients (**Relation** to client can be "Self").
- ◆ To view responsible person information, click the **Responsible Person(s)** tab (shown below).

- ◆ To enter a new person, click the **New** button.
- ◆ To update an existing responsible person, click the radio button next to that person's name.
- ◆ After adding or editing information, click **Next** to load it.

### Client Comment(s) tab

- ◆ This is where you'll document immunity, refusals, contraindications etc. Client Comments impact the vaccines recommended by the tracking schedule.
- ◆ To view client comments, click on the **Client Comment(s)** tab (shown below).

- ◆ Click **New** to add a comment.
- ◆ To edit an existing comment, click on the radio button next to that comment.
- ◆ **Applies-To Date:** This is typically the same date as the date that you are entering the comment.

- ◆ **End Date:** Not a required field, but should be entered when applicable to the client comment (e.g. pregnancy).
- ◆ After adding or editing information, click **Next** to load it.

## Viewing the History/Recommend Screen

- ◆ To open the History/Recommend screen from the Edit Client screen, click **History/ Recommend** (shown below).

### Client Information section

- ◆ This section includes all identifying information for a client, including name, address, gender, mother's maiden name, chart number and any client comments.
- ◆ **Client Comments** are displayed in red font. Use the down arrow (shown below) to click through the comments.

### History section

- ◆ This section lists all vaccines that have been entered into the NCIR for the client.
- ◆ The client's exact age is displayed in the blue strip at the bottom of this section.

History	New Immunization Entry	Historical Immunization	Edit Client	Reports	Print	Print Confidential		
Vaccine Group	Date Administered	Series	Trade Name	Dose	Owned?	Reaction	Hist?	Edit
DTP/aP	04/15/1993	1 of 5			No		Yes	
	09/30/2009	NOT VALID					Yes	
HepB	01/15/1993	1 of 3			No		Yes	
HPV	09/30/2013	1 of 3	Cervarix	Full	No			
Influenza	09/30/2013	1 of 1	FluLaval	Full	No			
Meningo	01/15/2008	1 of 1			No		Yes	
	08/29/2010				No		Yes	
MMR	01/22/1994	1 of 2			No		Yes	
PneumoConjugate	04/15/1993	1 of 2			No		Yes	
	09/06/1993				No		Yes	
Td	09/18/2013	1 of 2					Yes	
Tdap/Pertussis	09/18/2013	1 of 1					Yes	
Varicella	07/01/2013	1 of 2				Yes	Yes	
Current Age: 23 years, 8 months, 29 days								

- ◆ **Series:** The dose number for the immunization series (It also shows when a dose is Not Valid). Click the **Date Administered** to display the tracking schedule rules applied to that dose. If not valid, an explanation is also provided.
- ◆ **Trade Name:** Trade name of the vaccination received
- ◆ **Dose:** Amount Administered—e.g. full, half, etc.
- ◆ **Owned?:** Whether or not your organization administered the dose. If No, click the hyperlink to see who did.
- ◆ **Reaction:** Any documented reaction to the dose. If Yes, click the red hyperlink for details.
- ◆ **Hist?:** Whether the immunization was historical or recorded through inventory.
- ◆ **Edit:** Allows you to edit the immunization.

### Vaccines Recommended by Selected Tracking Schedule

- ◆ NCIR recommendations are based on:
  - Current ACIP Recommendations
  - Age of client
  - History entered into the NCIR
  - Any client comments and/or contraindications

Vaccines Recommended by Selected Tracking Schedule						Add Selected
Select	Vaccine Group	Earliest Date	Recommended Date	Overdue Date	Latest Date	
<input checked="" type="checkbox"/>	DTPaP		Maximum Age Exceeded			
<input checked="" type="checkbox"/>	HepA	01/01/1994	01/01/1994	01/01/1995		
<input checked="" type="checkbox"/>	HepB	02/12/1993	02/15/1993	03/15/1993		
<input type="checkbox"/>	HPV	08/27/2013	09/30/2013	01/01/2020	12/31/2019	
<input checked="" type="checkbox"/>	Influenza	07/01/1993	07/01/1993	01/01/1994		
<input checked="" type="checkbox"/>	Meningo		Complete			
<input checked="" type="checkbox"/>	MMR	07/29/2013	07/29/2013	07/29/2013		
<input checked="" type="checkbox"/>	PneumoConjugate		Maximum Age Exceeded			
<input checked="" type="checkbox"/>	Polio	02/12/1993	03/01/1993	04/01/1993		
<input checked="" type="checkbox"/>	Td	01/01/2000	01/01/2000	02/01/2000		
<input checked="" type="checkbox"/>	Tdap/Pertussis	01/01/2000	01/01/2004	01/01/2005		
<input checked="" type="checkbox"/>	Varicella	07/29/2013	07/29/2013	09/01/2013		

- ◆ **Select:** Checked boxes indicate vaccines that are currently recommended for patient as of today
- ◆ **Vaccine Group:** Recommended vaccine type. For an explanation of the recommendation, click on the blue hyperlink to see the tracking schedules rules applied.
- ◆ This section indicates the **Earliest Date**, **Recommended Date**, **Overdue Date**, and **Latest Date** the patient should receive the corresponding vaccine.
- ◆ The date columns are color coded. For a color key, click the light bulb button on the blue menu while viewing this screen.

## Entering Historical Immunizations

Please document all vaccines administered by your store as well as any doses from a valid certificate of immunization that have not already been documented.

### Vaccines administered at your pharmacy

1. Click **Manage Client** and search for the client.
2. Review the Edit Client screen and update any client information that has changed.
3. Review the History/Recommend screen and determine which vaccines are needed. Administer needed vaccines.
4. From the History/Recommend screen, click **Historical Immunizations** (shown below).

⇒ **Note:** Pharmacy users always enter doses administered by clicking the Historical Immunizations. This is because pharmacies do not track their inventory in the NCIR. Users who attempt to enter vaccines using the "New Immunization Entry" button will see the following error message:

This organization doesn't have any sites associated with it. You must have at least one site to add immunizations to the system.

5. When the screen for entering doses opens, look in the **Vaccine** column and find the vaccine or vaccines to be documented.



- ⇒ **Note:** If the vaccine you need is not listed, click on the blank dropdown box at the very bottom of the vaccine column to find and add it (*shown below*).
6. In the text box next to each vaccine administered (Provider Organization column), enter store name and (if applicable) number. Also enter the name and credentials of the pharmacist who administered the vaccine.

- ⇒ **Example: Pharmacy #12, John Smith, RPH**
7. In the next text box/date column, enter the date that the dose was administered.
8. Click the Trade Name Details button (*shown below*).

9. When the screen for entering Trade Name details opens (*example below*), enter Trade Name and Lot Number for each vaccine administered.

Historical Immunizations (1)					
Remove/Immunization	* Date Provided	Date Estimated	Trade Name	Lot Number	* Provider Org
<input type="checkbox"/> Tdap/Pertussis	09/18/2013		Adacel	SB1209	Pharmacy #22, F

10. Click Save.
11. You are returned to the History/Recommend screen. Review the history section to verify that the dose or doses were added accurately.

### Vaccines not administered at your pharmacy

- To enter doses from an official immunization record, follow the same steps as for entering administered doses except you must enter the name of the provider that administered the vaccine.
- You do not need to enter Trade Name or Lot Number, but please do so if you have the information available.

- Instead of clicking Trade Name Details, click Save and Submit to return to the History/Recommend screen.
- ⇒ **Note:** You are able to document multiple doses of a vaccine by using the additional date columns.

## Editing Immunizations

- To edit a dose of vaccine, including adding a vaccine reaction, from the History/Recommend screen.
1. Click the edit button (*shown below*) next to the vaccine you wish to edit (looks like a rocket ship).

History							
Vaccine Group	Date Administered	Series	Trade Name	Dose	Owned?	Reaction	Hist?
DTP/aP	04/15/1993	1 of 5			No		Yes
	09/30/2009	NOT VALID					
HepB	01/15/1993	1 of 3			No		Yes
HPV	09/30/2013	1 of 3	Cervarix	Full	No		
Influenza	09/30/2013	1 of 1	FluLaval	Full	No		
Meningo	01/15/2008	1 of 1			No	Yes	
	08/29/2010				No	Yes	
MMR	01/27/1994	1 of 2			No	Yes	

- ⇒ **Note:** Any user, at any organization, may delete or update a historical immunization. Except for reactions to immunizations, edits to doses recorded through inventory can only be made by the organization that gave the dose.
2. When the screen for editing historical immunizations opens (*shown below*), you are able to update any of the following fields:

- Trade Name
  - Lot Number
  - Date Provided
  - Provider Organization
  - Reactions to Immunization
3. After editing, click the Save button.

- ⇒ **Note:** If vaccine was given from another organization's inventory, click on the No hyperlink (in the Owned? column) to view which organization administered the shot, as well as the contact information (*example below*).

History							
Vaccine Group	Date Administered	Series	Trade Name	Dose	Owned?	Reaction	Hist?
DTP/aP	03/01/2008	1 of 5	Fedrix	Full	Full	Yes	
	05/14/2008	2 of 5	Tripevia	Full	Full		
	07/27/2008	3 of 5	Fedrix	Full	No		
HepB	01/01/2008	1 of 5	Recombinovax Peds	Full	Full	Yes	
				Full	No		
Hib				Full	Full	Yes	
				Full	Full		
Influenza				Full	Full		
				Full	Full		

## Printing Immunization Records

The patient copy fulfills the requirements for an official certificate of immunization.

- From either the Client Information or History/Recommend screen, click the Reports button.
- When the screen opens, click the Immunization Record - Patient Copy button (*shown below*). The client record will open as an Adobe PDF file.

- Print the record.
- Click the back button in your browser window to return to the Reports screen.

## Adding Users

This applies only to users with a Pharmacy Administrator Role.

- ⇒ **Reminder:** To add an employee as a user, the employee must already have created a NCID, verified their NCID through email, and provided you with their username (i.e. NCID user ID).
- ⇒ **Reminder:** New users need to register for a NCID as a "Business User" and provide their North Carolina business address.
1. Click Manage Users.
  2. Click Add User (shown below).

User Search

Last Name  First Name

3. Type in the username in the box provided and click Verify (example shown below).

Add User Please enter the username (NCID User name) only and click on the verify button.

Provider Org Name bqs new pharmacy  
Organization Code bqsPharm

\* Username

\* User First Name   
\* User Last Name   
\* User Middle Initial

\* Role   
\* Status ☐ Active ☐ Inactive

Street Address  P.O. Box   
Other Address   
City  State  Zip  -

Email

NOTE: Fields marked with an asterisk \* are required.

4. Confirm that the personal information retrieved is correct for the user that you are adding (example below). Make sure the address retrieved is a NC business address. If it is not, edit the address.

Add User

Provider Org Name bqs new pharmacy  
Organization Code bqsPharm

\* Username

\* User First Name   
\* User Last Name   
\* User Middle Initial

\* Role   
\* Status ☒ Active ☐ Inactive

Street Address   
Other Address   
City  State  Zip  -

Email

5. Choose the appropriate Role for the user by clicking on the drop down.
6. Click Save.

⇒ **Note:** If a user has not registered for a username, the following message will appear at the top of the screen:

### Validation Errors

- Cannot add this user. This user is not defined in NCID.

## Editing/Inactivating Users

This applies only to users with a Pharmacy Administrator Role.

1. Click Manage Users.
2. Click Find.
3. A complete list of active and inactive users for your organization will appear in the search results list. Click the user's Last Name.
4. Edit client information as needed.
  - ◆ To inactivate a user, change the Status to inactive by clicking on the radio button (shown below).
5. Click Save.

Edit User

Provider Org Name bqs new pharmacy  
Organization Code bqsPharm

\* Username

\* User First Name   
\* User Last Name   
\* User Middle Initial

\* Role   
\* Status ☐ Active ☒ Inactive

Street Address   
Other Address   
City  State  Zip  -

Email

⇒ **Note:** Pharmacy Administrators should review their pharmacy's users regularly and should inactivate users as soon as they are no longer affiliated with the organization.